



9 | INTERNATIONAL TCG  
RETAIL SUMMIT

# Surviving today to transition to future success

Toby Pickard, Global Insight Leader

from **IGD**

# Globally connected



# It has been tough for retail...

**Intermarché, Système U, Carrefour... The war of "anti-inflation baskets"**

**Morrisons slashes prices again, extends price freeze**

**Discounters are gaining market share**

**Coop cuts opening hours**

**Exit from Denmark: Aldi**

**Mars at war with Rewe and Edeka**

**Goodbye fresh milk in 2023: it will no longer be in supermarkets. The**

**Lidl slows down store openings**

**Amazon CEO Says Job Cuts To Exceed 18,000 Roles**

**Spain's Biggest Retailer Mercadona To Raise Wages In Line With Inflation**

**HelloFresh Retreats From Japanese Market**

# Retailer priorities: winning today and tomorrow

## Building resilience



Responding to the cost of living crisis



Building supply chain resilience



Ensuring relevance of physical stores

## Transitioning



Being more sustainable businesses



Meeting the needs of health aware shoppers



Making omnichannel easier and more profitable

## Delivering reinvention



Investing in digital transformation



Positioning in a new competitive landscape



Building the businesses of the future

Time: business lens on delivery

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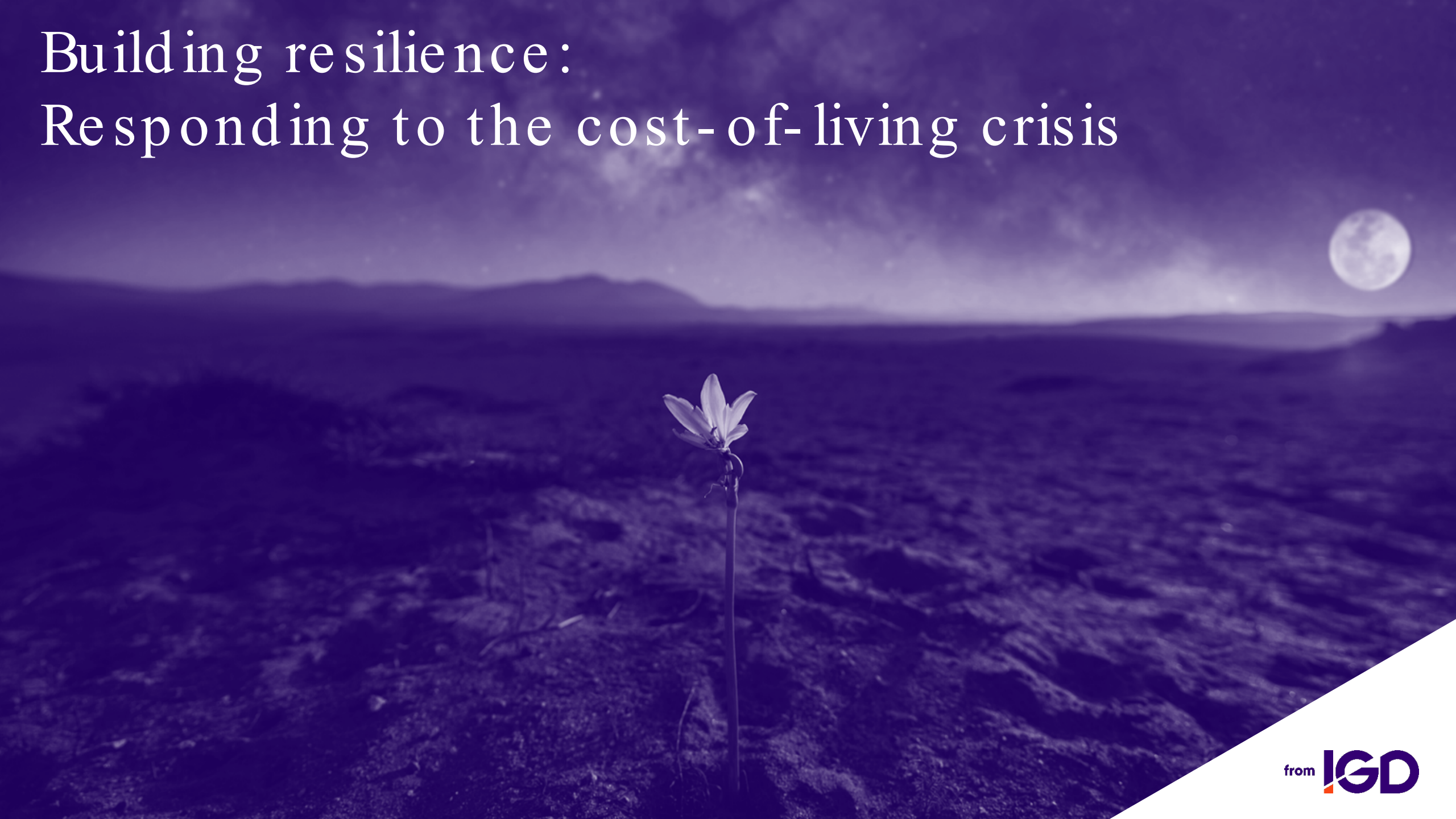
Positioning in a new competitive landscape



Building the businesses of the future

Time: business lens on delivery

# Building resilience: Responding to the cost-of-living crisis





Same high standards.  
NEW LOWER PRICE  
Grown in Mexico  
Strawberries  
\$3.49 lb

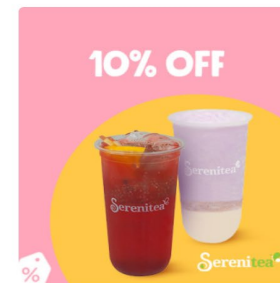
NEW LOWER PRICE  
Grown in Mexico  
Raspberries  
\$2.99 lb

Blackberries  
\$1.99 lb

Member - only pricing



Treating the best customers better



10% OFF



15% OFF



15% OFF



FREE Honey Toast



FREE Young Coconut  
Crepe Cake



FREE Pepi Cubano  
Sandwich

# Poupança a todos os níveis.

Para entrar no Clube registe-se  
em **auchan.pt** ou na App Auchan.

## Clube Auchan



Fã

Super Fã

Hiper Fã



Conheça as  
Promoções  
Exclusivas

## Dê as boas-vindas ao clube e suba até ao nível Hiper Fã.

### Vantagens Fã

0 a 1500 pts

Desconto de 10% em produtos de marca Auchan, todas as segundas-feiras.

Oferta de um **cupão no valor de 5€**, por cada 100€ em compras da gama Saúde e Bem-Estar.

Oferta de 1 **café** em todas as suas visitas diárias\*.

Promoções exclusivas  
para Fãs.

### Vantagens Super Fã

1501 a 3500 pts

Promoções exclusivas  
para Super Fãs.

### GRÁTIS Taxa Drive

em todas as compras online\*.

### 50% DESCONTO

Taxa de entrega ao domicílio.  
Válido para compras online  
e compras em loja\*.

### Vantagens Hiper Fã

+ 3501 pts

Promoções exclusivas  
para Hiper Fãs.

### GRÁTIS Taxa Drive

em todas as compras online\*.

### GRÁTIS

Taxa de entrega ao domicílio.  
Válido para compras online  
e compras em loja\*.

Personalised pricing

# Handpicked prices





Are you locking in shopper loyalty?





Building resilience:  
Ensuring relevance of physical stores



Unique and bold design

A wide-angle photograph of a modern Samsung store interior. The focal point is a large, dark, trapezoidal screen in the center background displaying the white text "#SamsungKX". The ceiling is a complex, curved white structure with multiple rows of circular recessed lights and several track-mounted spotlights. The floor is made of large, light-colored stone tiles. To the left, there's a curved, low-profile seating area with grey cushions and yellow pillows. In the background on the left, a service counter with a yellow-lit wall and shelves of products is visible. To the right, another section of the store is visible, featuring a red armchair and more product displays. The overall atmosphere is clean, bright, and high-tech.

#SamsungKX

Creating an immersive experience to learn, shop and play





Are your stores exciting and entertaining  
(and inclusive)?

# Transitioning: Being a sustainable business



# Building better stores



# Investing for the future



Target's first net zero energy store in California generates more renewable energy than it uses each year.

Recycling will become more sophisticated and rewarding





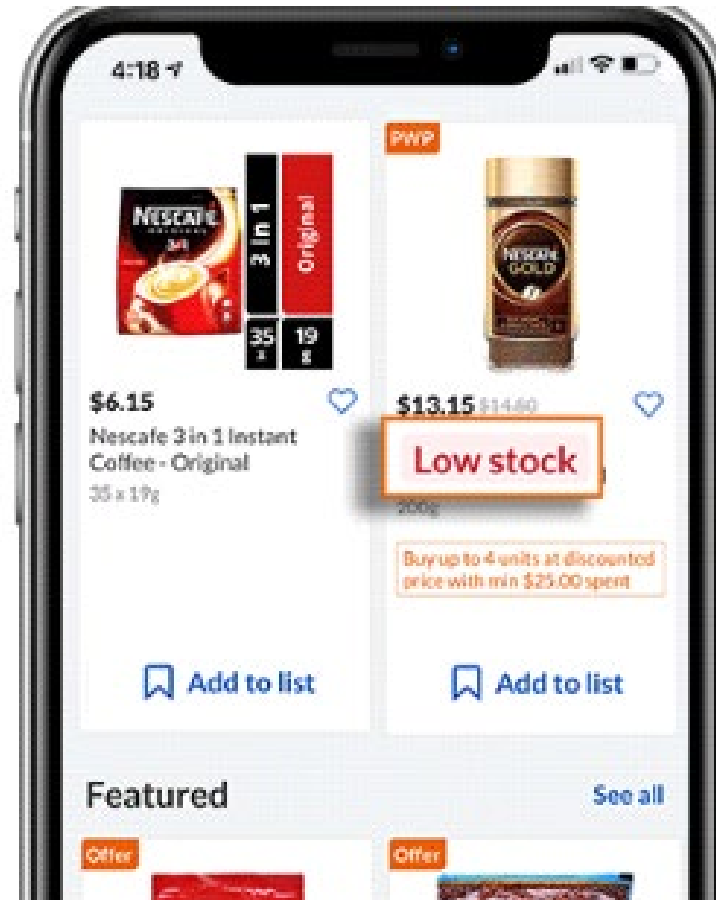
Are your operations sustainable?



# Transitioning: Making omnichannel easier and more profitable



# Smartphone apps will take more control of the experience



Pre and in-store enhanced experience: FairPrice, Singapore

# Customer service will blend online and offline solutions



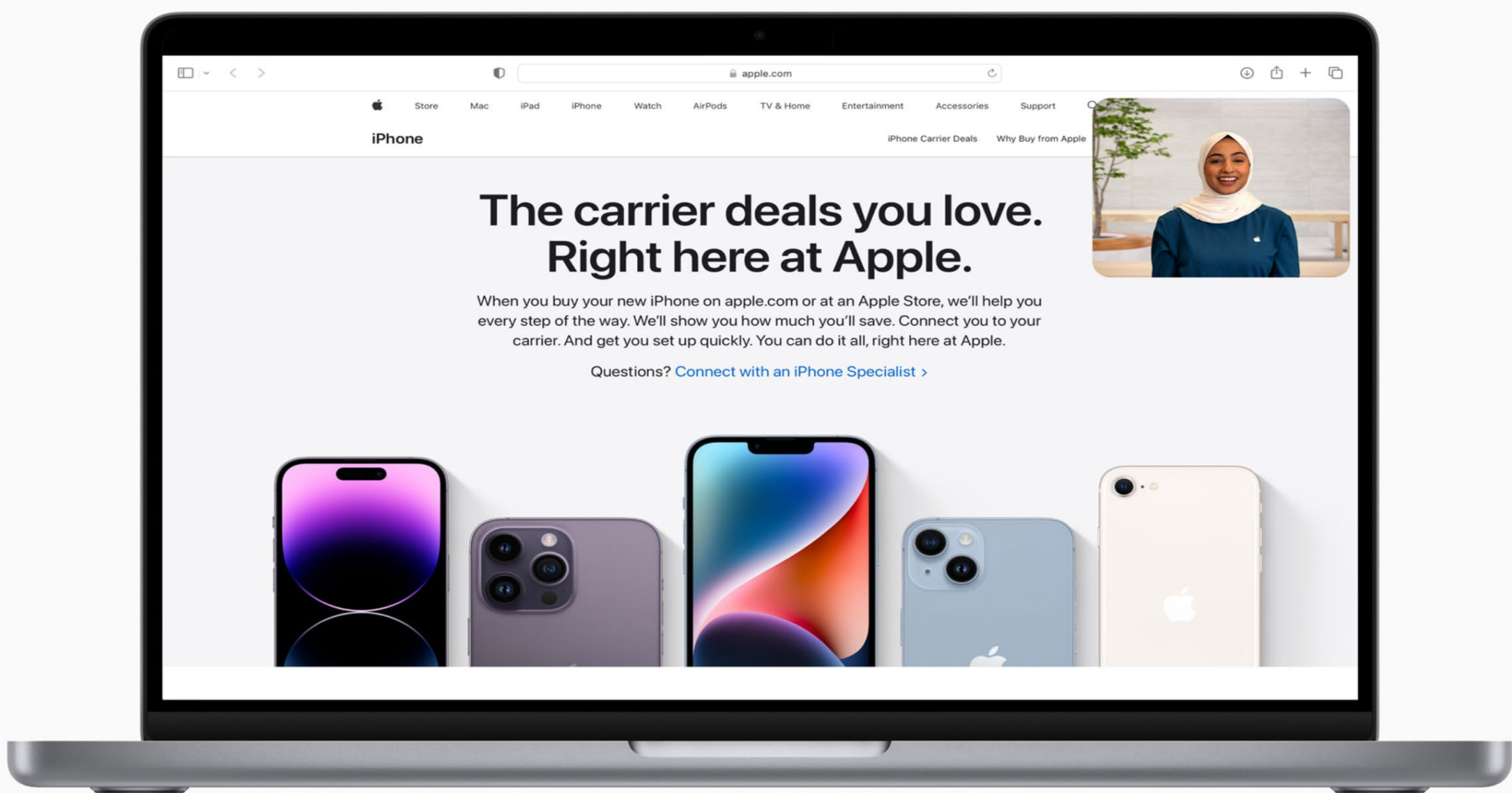
Superdrug, UK: Store Insider

# Physical and digital converge



Lawson, Japan: On-screen avatars remotely-controlled by employees

# Shop with a specialist over video



# Encourage collection from store





Are you offering an effective  
omnichannel experience?



# Delivering reinvention: Investing in digital transformation



# Tech is enabling the end of checkouts



# Efficiencies to insights

BONI Cappuccino instant UTZ 200g

Laagste prijs

Meilleur prix

**1,97 €**



9,85 €/kg

OS 37 st  
40868

G incl 1,890€  
G excl 1,753€

verval  
à partir du 3

**1,89 €**

9,45 €/kg

Reduces  
stock time by  
up to 90  
minutes per  
day

# Making it eye catching



Kavanagh's Budgens, UK: Digital displays

# Making it informative



Drives 5 to 10x  
the  
engagement of  
traditional  
digital signage

# All knowing: Artificial Intelligence



Aldi Nord: Trigo's sensors and technology automatically provides real-time on-shelf availability for each shelf and product, to accelerate the shelf replenishment process and reduce out-of-stock rates

“

The future is already here its  
just not evenly distributed.

”

William Gibson

“

We overestimate the effect of  
a technology in the short run  
and underestimate the effect  
in the long run.

”

Roy Amara, President Institute of the Future



Are you investing in digital technology  
to enhance your stores  
or  
are you getting left behind?

# Stay in contact



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